

1 Lillian Salwasser (Estate)**Case No. 07CEPR00104****Atty Matthai, Edith (for Craig A. Houghton – Objector)****Atty Manock, Charles K. (for George Salwasser/Executor of the Estate of Lillian Salwasser)****Atty Chielpegian, Michael S (for Marvin Salwasser/Administratoor with Will Annexed of Walter Salwasser Respondent)****Atty Wright, Janet L. (for George Salwasser/Executor)****Atty Farley, Michael L. (of Visalia, for Gary E. Salwasser - Beneficiary)****Status Hearing**

		George Salwasser is Executor.	NEEDS/PROBLEMS/COMMENTS:
		An Amended and Restated First Account was filed on 1-13-10 and has been continued with reference to additional ongoing matters in this and other related cases.	Minute Order 6-7-13: Ms. Wright advises the Court that she has a petition drafted. Continued to 8-9-13.
Cont. from 060713,080913		This status hearing was set on 4-26-13.	Minute Order 8-9-13: Counsel requests continuance. Continued to 10-4-13.
	Aff.Sub.Wit.	<p>Status report filed 6-6-13 by Attorney Janet Wright states counsel met and conferred on 5-16-13 with attorneys Craig Houghton and Mark Poochigian of Baker Manock & Jensen, who represented the Executor in his initial appointment through December 2008, and in various extraordinary matters, and with Executor, to review the proposed Petition for Final Distribution on Waiver of Account.</p> <p>It was determined that in order to close the estate pursuant to the Memorandum of Settlement Agreement entered into by beneficiaries Gary Salwasser and George Salwasser after mediation, certain matters would need to be addressed:</p> <ol style="list-style-type: none"> 1. Amendment to estate tax return 2. Inventory and Appraisal for promissory notes (preliminary payment history attached) <p>Once the amendment to the estate tax return is completed, it should be possible to create a formula taking into account the allocation of fees and costs pursuant to the agreement and any credits due beneficiaries which would allow the petition to be filed and estate to be closed.</p> <p>Counsel is developing a draft formula and will meet and confirm with counsel for Gary Salwasser as well as Baker Manock & Jensen. If a formula cannot be agreed upon, the Petition will be filed specifying the areas of dispute.</p>	<p>Status Report filed 8-7-13 states an amended tax return is being prepared and will be submitted to the IRS upon completion by Craig Houghton of Baker Manock & Jensen. At this time, Mr. Houghton is still not in possession of sufficient information in regards to the amended tax matters to provide Ms. Wright with the information needed to close the estate. It is requested that the status hearing be continued to 10-4-13.</p> <p>1. Need amended account / petition for final distribution.</p>
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 9-30-13
			Updates:
			Recommendation:
			File 1 – Salwasser

		CHRISTINE ADAMS is the current Trustee.	NEEDS/PROBLEMS/COMMENTS:
		Order dated 8/13/13 allowed Christine Adams to add \$603,639.16 to the trust from the estate of Barbara Scharon estate.	1. Need first account or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Cont. from		Minute order dated 8/12/13 set this status hearing for the filing of the first account.	
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR.</u> Order for Final Distribution signed on 9/20/13.
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: KT
		Reviewed on: 9/30/13
		Updates:
		Recommendation:
		File 3 - Barnes

4 Edward Uribe Medina (Estate)**Case No. 12CEPR00470****Atty Perez, Holley H (For Executor Susan K. Medina)****Probate Status Hearing Re: First Accounting or Petition for Final Distribution**

DOD: 2/25/2011	SUSAN K. MEDINA was appointed executor with full IAEA authority and without bond on 7/31/12.	NEEDS/PROBLEMS/COMMENTS: 1. Inventory and Appraisal filed on 1/9/13 states it is a partial inventory. Need final inventory. 2. Inventory and Appraisal filed on 1/9/13 includes 3 parcels of vacant land that were not appraised.
	Letters issued 8/14/13.	
Cont. from	Inventory and appraisal, partial no. 1 filed on 1/9/13 showing a value of \$173,000.00	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 9/30/13
		Updates:
		Recommendation:
		File 4 - Medina

		NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR. Order for Final Distribution signed on 4/29/13.
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 9/30/13
		Updates:
		Recommendation:
		File 5 - Lee

[illegible]

7 Christine Noel Bideaux (CONS/PE)

Case No. 03CEPR00552

Atty Sanoian, Joanne

Atty Sharbaugh, Catherine

Status Hearing Re: Confirmation of Receipt of Transfer

Age:		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Receipt of transfer by Tulare County Superior Court was filed 8-15-13.	
DOD:			
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
<input type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg			
<input type="checkbox"/> Aff.Mail			
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
Reviewed by: skc			
Reviewed on: 9-30-13			
Updates:			
Recommendation:			
File 7 – Bideaux			

Status Hearing Re: Filing of the Inventory and Appraisal; Filing of First Account and/or Petition for Final Distribution

DOD: 6-9-11		<p>JANETTE COURTNEY, was appointed Executor with Full IAEA without bond and Letters issued on 9-15-11.</p> <p>Inventory and Appraisal Partial No. 1 filed 2-13-13 included commercial real property valued at \$250,000.00, which was sold pursuant to Order Confirming Sale of Real Property.</p> <p>At hearing on 2-25-13, the Court set status hearing for 4-8-13 for the filing of the Final Inventory and Appraisal, filing of the first account, and/or petition for final distribution.</p> <p>The status hearing for filing of the final Inventory and Appraisal has been continued to 6-28-13 and now 7-26-13.</p> <p>Status Report filed 7-19-13 states:</p> <ul style="list-style-type: none"> Petitioner has performed all required duties as personal representative All known debts have been paid except for mortgage on real property which has a market value below the mortgage amount All administration costs to date except for compensation to the personal representative and attorney have been paid The estate is solvent A creditor's claim filed by Steven Drummond has been rejected There is currently no pending litigation involving the estate; however, there is a potential claim against beneficiaries for recovery of a vehicle and reimbursement for sales tax paid The status of a business being operated by a beneficiary, and the estate's current interest therein, has yet to be determined/negotiated. It is estimated that an additional three (3) months will be needed to complete administration of the estate, unless litigation is needed to recover the vehicle. Petitioner requests authority to continue administration until 10-1-13. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 4-8-13: Mr. Keeler and Mr. Ivy are appearing via conference call. Mr. Ivy is directed to file a fully executed agreement with the court. Matter is set for Status Hearing on 5/24/13 regarding the settlement agreement and the dismissal. If the agreement and dismissal are filed by 5/24/13, no appearance will be necessary. The status hearing regarding the inventory and appraisal is continued to 6/28/13 for appearance by Mr. Neilson only. Set on 5/24/13 @ 9:00 a.m. Dept. 303 for: Status Hearing Re: Settlement Agreement and Dismissal</p> <p>Note: Full and Complete Settlement Agreement and Mutual Release of All Claims filed 4-11-13, and dismissal of petition filed by Dennis L. Thomas on 12-19-11 was entered on 5-1-13.</p> <p>1. Need Final I&A.</p> <p>2. Need First Account or Petition for Final Distribution pursuant to Probate Code §12200.</p>
Cont. from 040813, 062813, 072613			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202 Order		
<input type="checkbox"/>	Aff. Posting		
<input checked="" type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: skc</p> <p>Reviewed on: 9-30-13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 8 - Drummond</p>	

9 Jesus Soto (Special Needs Trust)

Case No. 11CEPR00718

Atty Pimentel, Paul J.

Atty Kruthers, Heather H

Status Hearing Re: Filing of the First Account

Age:		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> First account was settled on 7-2-13.
DOD:		
Cont. from		
<input type="checkbox"/>	Aff.Sub.Wit.	
<input type="checkbox"/>	Verified	
<input type="checkbox"/>	Inventory	
<input type="checkbox"/>	PTC	
<input type="checkbox"/>	Not.Cred.	
<input type="checkbox"/>	Notice of Hrg	
<input type="checkbox"/>	Aff.Mail	
<input type="checkbox"/>	Aff.Pub.	
<input type="checkbox"/>	Sp.Ntc.	
<input type="checkbox"/>	Pers.Serv.	
<input type="checkbox"/>	Conf. Screen	
<input type="checkbox"/>	Letters	
<input type="checkbox"/>	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
<input type="checkbox"/>	CI Report	
<input type="checkbox"/>	9202	
<input type="checkbox"/>	Order	
<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: skc
		Reviewed on: 9-30-13
		Updates:
		Recommendation:
		File 9 - Soto

			JENNIFER R. KEMP , Mother, was appointed as Guardian of the Estate for the minor on 5-31-12. On 5-31-12, the Court set this status hearing for the filing of the first account.	NEEDS/PROBLEMS/COMMENTS: 1. Need first account or verified written status report.
	Aff.Sub.Wit.			
	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 9-30-13	
			Updates:	
			Recommendation:	
			File 10 - Kemp	

Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p>OFF CALENDAR</p> <p>Order for Final Distribution was entered 8-13-13.</p>	
	Reviewed by: skc	
	Reviewed on: 9-30-13	
	Updates:	
	Recommendation:	
	File 11 - Govier	

Age:			NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Order Settling First and Final Account was entered 2-20-13.
DOD:			
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: skc Reviewed on: 9-30-13 Updates: Recommendation: File 12 - Pawlik	

Probate Status Hearing Re: Filing of Receipt for Blocked Account

Age: 74		<p>TEMP (ESTATE ONLY) EXPIRES 10-4-13</p> <p>VANCE SEVERIN and TERRI SEVERIN, Brother and Sister of Mr. Salzman's wife, Stacy Salzman, were appointed as Temporary Co-Conservators of the Person and Estate without bond (bond upon permanent appointment) on 9-25-12.</p> <p>At a hearing on 11-5-12, the Court set this status hearing for the filing of the I&A.</p> <p>On 12-10-12, The Temporary Co-Conservators were authorized to sell the Conservatee's real property, with proceeds to be deposited into a blocked account.</p> <p>At hearing on 1-7-13, the petition for conservatorship of the <u>person</u> was withdrawn, and the conservatorship of the <u>estate</u> was extended to 3-29-13, but limited to the sale of the property and negotiate and settle with the Conservatee's creditors, including California Franchise Tax Board and IRS.</p> <p>Also on 1-7-13, the Court set this status hearing for filing of the First or Final Account of Temporary Conservator.</p> <p>Status Report filed 3-21-13 by Attorney Motsenbocker (unverified) states that at this time due to unforeseen circumstances and complications the house has not sold. There have been issues with repairs and other matters which have delayed sale. The parties are hopeful that in the next 30 days the house will sell. There are no funds to deposit to blocked account since the house has not sold. I&A has not been filed as the Co-Conservators were under the impression that this matter would be terminated by now. Since that has not happened, the only asset to be inventoried is the Conservatee's joint tenancy interest in the house. The Co-Conservators request a short extension to file I&A.</p> <p>Inventory and Appraisal filed 5-22-13 reflects Mr. Salzman's 50% interest in the real property valued at \$75,000.00.</p> <p>Status Report filed 6-12-13 states the house has been on the market for 20 days listed at \$417,000.00. It has been completely rehabilitated and looks terrific. There are some issues with the contractor who did the rehabilitation that will need to be worked out once a solid offer is received. The Co-Conservators and spouse are hopeful that an offer will be made soon and are considering adjusting the listing price downward.</p> <p>The Co-Conservators request temporary conservatorship be extended 60-90 days to complete their limited powers to sell the house, place the money in a blocked account, and file their first and final account.</p>	<p>NEEDS/PROBLEMS/ COMMENTS:</p> <p><u>Continued from 3-22-13, 4-26-13</u></p> <p>Status Report (unverified) filed 4-23-13 by Attorney Motsenbocker states there were issues with repairs and other matters that have delayed sale, but the parties are hopeful that the house will be sold in the next 30-60 days. The inventory is in process and will be filed shortly, the only asset being the Conservatee's joint tenancy interest in the house. The only new occurrence is that the Conservatee recently had "another" stroke for which he was hospitalized for a short time. He was returned home and is now an "outpatient only." The Co-Conservators request that the Court extend the temp letters to the next hearing date and such other and further orders that the Court considers just and proper.</p> <p>Note: Post-Move Notice of Change of Residence of Conservatee filed 5-22-13 indicates that Mr. Salzman was moved to Leisure Village in Camarillo, CA, as of 3-4-13.</p> <p>1. Need receipt for blocked account (sale proceeds).</p>
Cont. from 032213,042613,061 413			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Age: 74	TEMP (ESTATE ONLY) EXPIRES 10-4-13	NEEDS/PROBLEMS/COMMENTS:
Cont. from 032913, 042613, 061413	VANCE SEVERIN and TERRI SEVERIN , Brother and Sister of Mr. Salzman's wife, Stacy Salzman, were appointed as Temporary Co-Conservators of the Person and Estate without bond (bond upon permanent appointment) on 9-25-12.	<u>Continued from 3-29-13, 4-26-13</u>
Aff.Sub.Wit.		<u>Minute Order 3-22-13</u> : Mr. Motsenbocker requests a continuance to file the inventory. Matter continued to 4/26/13. At the request of both counsel, the hearing scheduled for 3/29/13 is vacated and rescheduled for 4/26/13.
Verified		
Inventory		
PTC	At a hearing on 11-5-12, the Court set status hearing for the filing of the I&A for 3-22-13.	
Not.Cred.		
Notice of Hrg	On 12-10-12, The Temporary Co-Conservators were authorized to sell the Conservatee's real property, with proceeds to be deposited into a blocked account.	<u>Status Report (unverified) filed 4-23-13 by Attorney Motsenbocker</u> states there were issues with repairs and other matters that have delayed sale, but the parties are hopeful that the house will be sold in the next 30-60 days. The inventory is in process and will be filed shortly, the only asset being the Conservatee's joint tenancy interest in the house. The only new occurrence is that the Conservatee recently had "another" stroke for which he was hospitalized for a short time. He was returned home and is now an "outpatient only." The Co-Conservators request that the Court extend the temp letters to the next hearing date and such other and further orders that the Court considers just and proper.
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	At hearing on 1-7-13, the petition for conservatorship of the <u>person</u> was withdrawn, and the conservatorship of the <u>estate</u> was extended to 3-29-13, but limited to the sale of the property and negotiate and settle with the Conservatee's creditors, including California Franchise Tax Board and IRS.	<u>Note: Post-Move Notice of Change of Residence of Conservatee filed 5-22-13</u> indicates that Mr. Salzman was moved to Leisure Village in Camarillo, CA, as of 3-4-13.
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order	Also on 1-7-13, the Court set this status hearing for filing of the First or Final Account of Temporary Conservator.	2. Need receipt for blocked account (sale proceeds)
	<u>Note: I&A filed 5-22-13 indicates the Conservatee's 50% real property interest valued at \$75,000.00.</u>	3. Need account.
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 9-30-13
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 14B - Salzman

DOD: 01/12/2013		WANDA JUNE TIMMONS , mother, was appointed Executor with full IAEA authority without bond on 03/19/2013.	NEEDS/PROBLEMS/COMMENTS:
		Letters issued on 03/21/2013.	<u>OFF CALENDAR FINAL INVENTORY AND APPRAISAL FILED</u> <u>09/18/2013</u>
Cont. from 081613		Inventory & Appraisal Partial No. 1 filed 04/10/2013 - \$577,500.00	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input checked="" type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LV
			Reviewed on: 10/02/2013
			Updates:
			Recommendation:
			File 14 – Bier

Status Hearing Re: Filing of the Inventory and Appraisal

DOD:11-26-11		<p>JOCELYN ALSDORF, Daughter, was appointed as Administrator with Will Annexed with Full IAEA without bond on 5-1-13.</p> <p>On 5-1-13, the Court set this status hearing for filing the Inventory and Appraisal.</p> <p>Inventory and Appraisal Partial No. 1 was filed 5-22-13.</p> <p>Report of Counsel filed 10-1-13 states the administrator has identified several financial accounts to be appraised; however, statements had to be requested. Some financial institutions required updated certified Letters, so obtaining and transmitting those have caused delay. It is anticipated that the final I&A will be filed within 60 days.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Final I&A or verified written status report.</p>
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: skc</p> <p>Reviewed on: 9-30-13</p> <p>Updates: 10-2-13</p> <p>Recommendation:</p> <p>File 15 - Alsdorf</p>	

DOD:1-22-13		GWEN G. HEMMINGER , Daughter, was appointed Administrator with Full IAEA with bond of \$550,000.00 on 5-1-13.	NEEDS/PROBLEMS/COMMENTS:
		Bond was filed and Letters issued on 6-26-13.	Note: The Administrator resides in Pensacola, Florida.
		On 5-1-13, the Court set this status hearing for filing the Inventory and Appraisal.	1. Need Inventory and Appraisal or verified written status report.
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			Reviewed by: skc
			Reviewed on: 9-30-13
			Updates:
			Recommendation:
			File 17 - Green

Age:			NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Receipt of transfer by Tulare County Superior Court was filed 8-26-13.
Cont. from			
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
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	Duties/Supp		
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	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed on: 9-30-13	
		Updates:	
		Recommendation:	
		File 18 - Bernal	

DOD: 10/11/10		KARLA DEAN , daughter, was appointed Administrator with Limited IAEA Authority, without bond on 12/13/12. Letters of Administration were issued on 01/15/13.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 040513		Minute Order from Status Hearing on 01/25/13 set this matter for status re filing of the Petition for Distribution on 04/05/13.	<u>OFF CALENDAR</u> Public Administrator was appointed successor administrator by the Court on 06/18/13. Minute Order from hearing on 09/06/13 continued a status hearing for the filing of the Public Administrator's Final Account to 01/10/14
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<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: JF	
		Reviewed on: 10/01/13	
		Updates:	
		Recommendation:	
		File 19 - Johnson	

Probate Status Hearing Re: First Accounting or Petition for Final Distributio

DOD: 12-3-11		JAMES RAY WATKINS , Son, was appointed as Executor with Full IAEA without bond on 7-31-12. On 7-31-12, the Court set this status hearing for filing the first account or petition for final distribution. Inventory and Appraisal filed 3-19-13 indicated a total estate value of \$60,500.00 consisting of real and personal property.	NEEDS/PROBLEMS/COMMENTS: 1. Need first account or petition for final distribution or verified written status report.	
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	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
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	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
Reviewed by: skc				
Reviewed on: 9-30-13				
Updates:				
Recommendation:				
File 20 - Watkins				

Probate Status Hearing Re: Filing First Account or Final Distribution

DOD: 5-18-12		<p>HENRY T. PEREA, Son, was appointed Executor with Full EAEA without bond on 8-2-12.</p> <p>On 8-2-12, the Court set this status hearing for filing of the first account or petition for final distribution.</p> <p>Final Inventory and Appraisal filed 11-13-12 reflected a total estate value of \$142,500.00 consisting of real property and a vehicle.</p> <p>Verified Status Report filed 9-25-13 states the encumbrance on the residence exceeds its value. Executor proposes to sell the home via short sale. The estate also has numerous creditor's claims including claims by the IRS and California Franchise Tax Board. Upon the sale of the residence, Executor will prepare his final report and petition.</p> <p>Executor requests an additional six months to complete the sale and file.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need first account or petition for final distribution.</p>
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Verified			
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CI Report			
9202			
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Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Probate Status Hearing Re: Failure to File Inventory and Appraisal and First Account or Petition for Final Distribution

DOD: 12/22/1997	<p>LISA BOWIE was appointed as Executor with Full IAEA authority and without bond on 9/11/01.</p> <p>Letters issued on 9/11/01.</p> <p>Inventory and appraisal was due on 1/11/02.</p> <p>First account or petition for final distribution was due on 9/11/02.</p> <p>Notice of Status Hearing was mailed to attorney David Knudson on July 31, 2013.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need inventory and appraisal and first account or petition for final distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
<p>Reviewed by: KT</p> <p>Reviewed on: 10/1/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File</p>		

Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for Failure to File a First Account or Petition for Final Distribution

DOD: 3/16/2001		<p>ARTHUR ROTH and HOWARD ROTH were appointed co-executors with full IAEA authority and without bond on 10/23/2001.</p> <p>Letters issued on 10/23/2001.</p> <p>Inventory and appraisal was due 2/23/2001.</p> <p>First account or petition for final distribution was due 10/23/2002.</p> <p>Notice of Status Hearing was mailed to Attorney Eliot Nahigian on 7/31/2013.</p> <p>Status Report filed on 9/23/2013 states Arthur Roth is the sole surviving co-executor. Howard Roth died on 9/10/2010. No inventory and appraisal has been filed in this estate. Decedent's assets were held in a living trust and no probate administration of Decedent's assets was necessary. Prior to Decedent's death a lawsuit was filed for breach of contract, open book account and quantum meruit against the Decedent. The primary purpose of opening the estate was to defend the lawsuit. The lawsuit was settled and a dismissal of the action was entered on 4/9/2013. Through inadvertence the estate was left open. Petitioner requests additional time to file the final report and petition to close the estate. The time requested in 6 months from the filing of this status report. Petitioner, Arthur Roth lives in New York. It would be extremely costly, time consuming and difficult for him to appear at the status hearing. For these reasons, Petitioner requests that he be excused from personally attending the status conference as ordered by the Notice of Status Hearing.</p>	NEEDS/PROBLEMS/COMMENTS:	
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<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
				<p>Reviewed by: KT</p> <p>Reviewed on: 10/1/2013</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 23 - Roth</p>

Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for
Failure to File a First Account or Petition for Final Distribution

Age:		NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR. Inventory and appraisal filed on 9/17/13. Petition for Final Distribution filed and set for hearing on 10/23/2013.
DOD:		
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<input type="checkbox"/>	Aff. Posting	
<input type="checkbox"/>	Status Rpt	
<input type="checkbox"/>	UCCJEA	
<input type="checkbox"/>	Citation	
<input type="checkbox"/>	FTB Notice	
		Reviewed by: KT
		Reviewed on: 10/1/2013
		Updates:
		Recommendation:
		File 24 - Pardini

**Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for
Failure to File a First Account or Petition for Final Distribution**

DOD: 7/2/2001		<p>VERNETTE A. FRIESEN was appointed Special Administrator on 12/28/2001 for the sole purpose of disclaiming the decedent's interest in the Trust created under the Will of John Hild.</p> <p>Letters issued on 12/28/2001 and had no expiration date.</p> <p>Notice of Status Hearing was mailed to attorney Michael Buettner on 7/31/2013.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need petition to close the estate or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
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<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: KT</p> <p>Reviewed on: 10/1/2013</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 25 - Hild</p>	

DOD: 6-7-01		RICHARD HICKMAN was appointed Executor with Full IAEA without bond and Letters issued on 3-19-02. According to file documents, the sole asset of the estate was an account containing approx. \$65,000.00; however, no Inventory and Appraisal was filed, and no account or petition for final distribution was filed. On 7-31-13, the Court set this status hearing for failure to file an Inventory and Appraisal and failure to file an account or petition for final distribution. Notice was mailed to Attorney Patricia Carrillo. On 9-24-13, Attorney Carrillo filed a status report stating that in 2003, he office received a letter from Attorney Thom Snyder (attached) indicating that his office was substituting in as attorney for Executor and demanding a copy of the file. Ms. Carrillo replied with copies as well as a billing statement. Mr. Snyder's reply demanded that she sign the Substitution of Attorney (attached, last signature dated 4-15-03, but not filed). Since her last communication with Attorney Thom Snyder on 4-15-03, Ms. Carrillo has not had any written or verbal communication with Executor or Mr. Snyder or any of the beneficiaries. Ms. Carrillo has not made any formal demands for payment of attorney fees or reimbursement of costs. Attorney Carrillo states that upon receipt of the Notice of Status Hearing, she emailed Attorney Snyder, but received a response that states his practice is closed as he is now with the Kings County District Attorney's Office, and he has not had contact with any of the parties in many years. Ms. Carrillo then mailed a copy of the Notice of Status Hearing to the Executor, Richard Hickman, and to date have not received any response. She has made several attempts via internet and telephone to contact him and the other parties, but has not been able to reach anyone. Attorney Carrillo states that it is her belief that the bank account was liquidated outside of the probate proceeding and the beneficiaries were given their fair distributions. Prior to filing the petition for probate, interfamily disputes had prohibited the beneficiaries from liquidating the account and had caused the initial filing of the probate case. The disputes continued the year after the petition for probate was granted, making it impossible to proceed with the filing of the required court documents. There is no evidence that there are any outstanding costs or expenses.	NEEDS/PROBLEMS/COMMENTS: Note: Attorney Carrillo is still the attorney of record in this case, as the Substitution of Attorney was never filed. Note: Pursuant to Decedent's Will, there are eight (8) heirs to the estate. Note: A Request for Special Notice was filed by two of the heirs, James R. Elerick, Ph.D., and Debra Jean Elerick, c/o Law Office of Rodney C. Haron, on 3-19-02. 1. Need Inventory and Appraisal. Probate Code §8900. 2. Need petition for final distribution. Probate Code §12200. 3. File documents reference an "embezzlement issue." The Court may require clarification.																																																																			
<table border="1"> <tr><td></td><td>Aff.Sub.Wit.</td><td></td></tr> <tr><td></td><td>Verified</td><td></td></tr> <tr><td></td><td>Inventory</td><td></td></tr> <tr><td></td><td>PTC</td><td></td></tr> <tr><td></td><td>Not.Cred.</td><td></td></tr> <tr><td></td><td>Notice of Hrg</td><td></td></tr> <tr><td></td><td>Aff.Mail</td><td></td></tr> <tr><td></td><td>Aff.Pub.</td><td></td></tr> <tr><td></td><td>Sp.Ntc.</td><td></td></tr> <tr><td></td><td>Pers.Serv.</td><td></td></tr> <tr><td></td><td>Conf. Screen</td><td></td></tr> <tr><td></td><td>Letters</td><td></td></tr> <tr><td></td><td>Duties/Supp</td><td></td></tr> <tr><td></td><td>Objections</td><td></td></tr> <tr><td></td><td>Video Receipt</td><td></td></tr> <tr><td></td><td>CI Report</td><td></td></tr> <tr><td></td><td>9202</td><td></td></tr> <tr><td></td><td>Order</td><td></td></tr> <tr><td></td><td>Aff. Posting</td><td></td></tr> <tr><td></td><td>Status Rpt</td><td></td></tr> <tr><td></td><td>UCCJEA</td><td></td></tr> <tr><td></td><td>Citation</td><td></td></tr> <tr><td></td><td>FTB Notice</td><td></td></tr> </table>					Aff.Sub.Wit.			Verified			Inventory			PTC			Not.Cred.			Notice of Hrg			Aff.Mail			Aff.Pub.			Sp.Ntc.			Pers.Serv.			Conf. Screen			Letters			Duties/Supp			Objections			Video Receipt			CI Report			9202			Order			Aff. Posting			Status Rpt			UCCJEA			Citation		
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DOD: 11/6/2001		<p>MARIAN A. WELLS, CAROLYN E. VART and DAVID C. VART, were appointed successor Executors with full IAEA and without bond on 5/26/2009.</p> <p>Letters issued on 5/26/2009.</p> <p>Notice of Status Hearing was mailed to Eliot Nahigian on 7/31/2013.</p> <p>Verified Status Report filed on 9/25/2013 states Bill Vart was appointed executor on 1/22/2002. Bill Vart died on 1/28/2008, after Letters issued. Marian A. Wells, Carolyn E. Vart and David C. Vart were appointed successor co-executors on 5/26/2009.</p> <p>At the time of their appointment as successor co-executors, it was believed that there was a brokerage account at Morgan Stanley Dean Witter that had not yet been distributed.</p> <p>Subsequent to their appointment it was determined that a mutual fund account with Franklin Templeton Investments was the account that had not been transferred and that the securities in the brokerage account at Morgan Stanley Dean Witter had been distributed.</p> <p>Additionally, the Fresno County Assessor's Office has informed the attorney that there was an error in the legal description of some of the real property in the decedent's estate. The co-executors, through their attorney, are in the process of preparing an ex parte petition to correct clerical errors in the real property.</p> <p>Executors request that a status hearing be set in approximately four months to allow time to liquidate and transfer the mutual funds, obtain a nunc pro tunc order to correct the clerical error in the real property and to re-record the deeds to properly transfer the interest in the real properties.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
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Reviewed by: KT
Reviewed on: 10/1/13
Updates:
Recommendation:
File 27 - Vart

Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for Failure to File a First Account or Petition for Final Distribution

DOD: 1/6/1997	<p>VALERIE YOUNGER, was appointed as Administrator with full IAEA authority and without bond on 2/5/2002.</p> <p>Letters issued on 2/5/2002.</p> <p>Inventory and appraisal was due 6/5/2002.</p> <p>First account or petition for final distribution was due 2/5/2003.</p> <p>Notice of Status Hearing was mailed to Valerie Younger on 7/31/13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need inventory and appraisal, first account or petition for final distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
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UCCJEA		
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<p>Reviewed by: KT</p> <p>Reviewed on: 10/1/2013</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 28 - Applewhite</p>		

DOD: 4/29/2001	<p>DANIEL IRISSARRI was appointed Executor with full IAEA authority and without bond on 3/5/2002.</p> <p>Letters issues 3/5/2002</p> <p>I & A filed on 3/22/2004 showing an estate valued at \$160,773.11.</p> <p>First account or petition for final distribution was due 3/5/2003.</p> <p>Notice of Status Hearing was mailed to attorney Jeff Shepard on 7/31/2013.</p> <p>Status Report filed on 7/26/2013 states the Executor informed Mr. Shepard that he will appear at the hearing pursuant to the Notice of Status Hearing sent to him.</p> <p>The Executor has informed Mr. Shepard that he will provide him with the information necessary to close the estate.</p>	NEEDS/PROBLEMS/COMMENTS:
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UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 10/1/2013
		Updates:
		Recommendation:
		File 29 – Irissarri

Probate Status Hearing for failure to file the Inventory and Appraisal and for Failure to File a First Account or Petition for Final Distribution

DOD: 12/17/1999	<p>MARK COPPEDGE was appointed as Executor with full IAEA authority and without bond on 4/10/2002.</p> <p>Letters issued on 4/11/2002.</p> <p>Inventory and Appraisal was due on 8/11/2002.</p> <p>First account or petition for final distribution was due 4/11/2003.</p> <p>Notice of Status Hearing was mailed to David Silva on 7/31/13.</p> <p>Verified Status Report of David Silva filed on 9/27/2013 states he was the attorney representing Mr. Coppedge. Mr. Silva states after his inability to connect with Mr. Coppedge to wrap up this matter in the latter part of 2002, he learned of his deteriorating physical condition was due to an illness he battled for the next three years. When he learn of his situation he wrote to Mr. Coppedge explaining that he would assist him in obtaining new counsel. Mr. Silva states he received no response from him.</p> <p>When the State Bar declared Mr. Silva ineligible to practice law, Mr. Silva states he sent him his original documents along with a letter informing him of his declared inability to practice law. Mr. Silva states he did not receive a response.</p> <p>Through the Fresno County Bar Association's Attorney Referral Service, Mr. Silva states he attempted to secure the names of probate lawyers to transition this matter. Mr. Silva was informed they no longer provide names of attorneys.</p> <p>Mr. Silva hopes to have made progress in securing an attorney for Mr. Coppedge by the date of the status hearing.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
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Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Reviewed by: KT
Reviewed on: 10/1/2013
Updates:
Recommendation:
File 30 - Coppedge

Probate Status Hearing Re: Failure to File First Account or Petition for Final Distribution

DOD: 06/22/07	LARRY A. DONALDSON , friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 012513, 032913, 042613, 072613	Notice of Status Hearing filed 11/28/12 set this matter for status. Clerk's Certificate of Mailing states that the Notice of Status Hearing was mailed to Larry A. Donaldson on 10/19/12.	CONTINUED FROM 07/26/13 Minute order from 07/26/13 states: Mr. Donaldson advises the Court that he filed a status statement yesterday. He further advises that the accounting is being done however he may have a conflict which may require another attorney to complete the work in this matter. The Court on its own motion accepts Mr. Donaldson's withdrawal as Executor in this matter and appoints the Public Administrator. Mr. Donaldson is directed to contact Ms. Kruthers.
Aff.Sub.Wit.		
✓ Verified		Note: Letters of Administration were issued to the Public Administrator on 08/01/13.
Inventory		
PTC		As of 10/01/13, the following remains outstanding:
Not.Cred.		
Notice of Hrg	Declaration of Beneficiary Laura Leonard re Probate Status Hearing – Failure to File First Account or Petition for Final Distribution filed 01/13/11 states: she and her brother (both beneficiaries of the estate) have made many written and verbal requests to Mr. Donaldson requesting an accounting and for their father's estate be brought to a close. Ms. Leonard states that Mr. Donaldson has ignored their requests and repeatedly failed to communicate with them regarding the estate. Ms. Leonard and her brother had an attorney, Frederick Borges, contact Mr. Donaldson on their behalf to request that he move forward with the estate. Mr. Donaldson responded that he would move forward, but has failed to do so. Ms. Leonard states that she and her brother have also made a complaint to the state bar of California regarding Mr. Donaldson's failure to act. Ms. Leonard states that after all of these efforts, Mr. Donaldson recently provided them with a sloppy, incomplete "accounting", however several years' worth of information is absent and many of the transactions are questionable. Declarant further states that she and her brother were supposed to receive a distribution in early January, but have not received anything.	<ol style="list-style-type: none"> 1. Need Final Inventory & Appraisal. 2. Need Accounting and/or Petition for Final Distribution.
Aff.Mail		
Aff.Pub.		Reviewed by: JF
Sp.Ntc.		
Pers.Serv.		Reviewed on: 10/01/13
Conf. Screen		
Letters		Updates:
Duties/Supp		
Objections		Recommendation:
Video Receipt		
CI Report		File 31 - Wallace
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice	Inventory & Appraisal, partial no. 1 filed 07/24/13 - \$1,619,273.76	